

## **TITLE OF TASK ORDER:   The Heart Truth Campaign**

### **I. Statement of Work**

NOTE TO OFFERORS: This RFTOP procurement will result in the award of a performance-based task order. As such, offerors shall propose measurable performance standards to enable assessment of contractor work performance. A Quality Assurance Surveillance Plan (QASP) will be negotiated in which specific key performance requirements and incentives will be identified.

#### **A. Background Information**

##### **1. Project Description**

The National Heart, Lung, and Blood Institute (NHLBI), part of the National Institutes of Health, U.S. Department of Health and Human Services (DHHS) is sponsoring a national awareness campaign for women about heart disease, called The Heart Truth, a key program of the NHLBI Women's Heart Health Education Initiative. The campaign was implemented in partnership with the DHHS Office on Women's Health, the American Heart Association, and WomenHeart: the National Coalition for Women with Heart Disease. The NHLBI Women's Heart Health Education Initiative was developed to support Healthy People 2010, the Federal Government's blueprint for building a healthier Nation over the next 10 years. Healthy People 2010 is designed to achieve two major overarching goals—to increase the quality and years of Americans' healthy life and to end racial and ethnic disparities in the burden of disease.

As part of the requirements of the Government Performance and Results Act (GPRA) and the Information Technology Management and Reform Act (ITMRA), performance measurement is an essential part of effective management and program implementation. By using clear, measurable, and end-result performance measures, The Heart Truth campaign can determine the extent to which it has achieved its objectives. The use of performance measures throughout the tasks contained or implied in this RFTOP is fundamental to all aspects of The Heart Truth campaign.

##### **2. Need for the Procurement/Background**

The NHLBI provides leadership for a national program in diseases of the heart, blood vessels, lung, and blood; blood resources; and sleep disorders. It also has administrative responsibility for the NIH Woman's Health Initiative. A critical adjunct to NHLBI's core program of clinical and basic research is its educational mandate—the translation and dissemination of science-based information. The essential role of both the research and educational tasks is the same: the reduction in mortality and morbidity resulting from heart, lung, and blood diseases and an increase in quality and years of healthy life for all Americans.

Within the NHLBI, the Office of Prevention, Education, and Control (OPEC) holds the lead responsibility for initiating educational activities and for translating research findings

into programs and products for use by a diverse audience of health care providers, public health practitioners, patients, and the general public.

Cardiovascular disease (CVD) is the leading cause of death and illness in American women. Overall, 6.7 million women of all ages suffer from heart disease: 1 in 8 women at ages 45 to 64 years and 1 in 3 women over age 65. About half a million women die of CVD every year; of those, more than 360,000 die of heart disease and more than 100,000 die of stroke. Despite the seriousness of heart attack, stroke, and other cardiovascular diseases in women, the symptoms are often unrecognized by both women and their physicians. Moreover, there is still a widespread misconception that heart disease is primarily a man=s disease.

National surveys have been conducted by the American Heart Association to assess women's awareness that heart disease is their #1 killer. Only 30 percent of women were aware of this fact in 1997 and 34 percent in 2000. Less than a year after the launch of The Heart Truth, a follow-up survey conducted in 2003 by the American Heart Association showed that awareness had increased to 46 percent. Despite the increase in awareness, the survey also showed that a knowledge gap remains—especially in women younger than 45, and in Hispanic and African American women. Moreover, a “disconnect” remains—only 13 percent named heart disease as their personal greatest health risk.

To address this lack of awareness and concern, NHLBI launched The Heart Truth, a national awareness campaign for women about heart disease in September 2001. The campaign began in response to recommendations of more than 70 experts in women's health who met to develop a national action plan to reduce the toll of heart disease on American women. The campaign was developed with input from partner organizations and women's focus groups across the country. This multifaceted campaign, which evolved through extensive formative research, targets women, ages 40-60 with the following strategic components:

- # National public service advertising and media relations campaign to build broad awareness,
- # National nonprofit partnerships reinforced at the regional and local levels to extend the campaign's reach and its messages,
- # Corporate partnerships to expand resources and enhance visibility of The Heart Truth's message,
- # Educational materials for women to learn about heart disease and how to reduce their risk factors,
- # Materials to equip community leaders to reach women with direct intervention, including an Online Tool Kit and Activity Registry,
- # The Heart Truth Road Show, a heart health traveling exhibit, which visited 5 major metropolitan areas in spring 2004, and
- # The Red Dress Collections 2003 and 2004 (see below).

These strategies are brought to life with a unique creative framework designed to:

- # Leverage women's interest in their outward appearance to focus on what's inside (e.g., their hearts),
- # Put a face on heart disease and reach women with personalized campaign

- messages through real women and their stories,
- # Provide a hard-hitting edgy approach to deliver a wake-up call to women, and
- # Promote the adoption of the Red Dress pin as the national symbol for women and heart disease awareness.

A central creative element of the campaign—a Red Dress visual paired with the message: “Heart Disease Doesn’t Care What You Wear—it’s the #1 Killer of Women”—tested extremely well in focus groups with women across the country. The Heart Truth campaign leveraged the Red Dress concept as the foundation for an initiative to mobilize the U.S. fashion industry in support of the issue and the campaign. The result was a groundbreaking partnership—the Red Dress Project—between the Federal Government and the fashion industry, with The Heart Truth featured at Fashion Week in February 2003 and 2004 during American Heart Month. Nineteen top U.S. fashion designers donated red dresses to The Heart Truth for the Red Dress Collection 2003 and 26 contributed red dresses in 2004, staging a one-of-a-kind fashion show. NHLBI introduced the Red Dress as the national symbol for women and heart disease awareness in February 2003. First Lady Laura Bush, who serves as the national ambassador for The Heart Truth campaign, hosted an American Heart Month celebration at the White House in February 2004, and has held several events throughout the country to raise awareness about women’s heart disease and help promote the campaign.

A key campaign strategy is the development of national, regional, and local partnerships. Partner outreach efforts have resulted in the development of a growing core of partners from many sectors including other Government agencies; health professional organizations; nonprofit groups; national media, including women’s magazines; States and local organizations including hospital systems; and corporations. A significant example of partnership outreach is the NHLBI Heart Truth Road Show, made possible through corporate sponsorship. The Road Show, a traveling heart health exhibit, visited five metropolitan areas in spring 2004 and provided CVD screening for nearly 4,000 people and information for more than 86,000.

Since its introduction in 2003, women around the country have rallied around the Red Dress and are celebrating the cause and taking ownership of the symbol. They are commissioning traveling exhibitions of The Heart Truth Red Dress Collection, called Single City Stops, around which they are creating diverse celebrations of women’s heart health including health fairs, galas, celebrity teas, and real women Red Dress fashion shows.

Outreach to and education of health care professionals about women’s heart disease is also a goal of The Heart Truth. NHLBI and the DHHS Office on Women’s Health are working together on a project to develop and implement a variety of continuing education materials and activities for physicians, nurses, and other health professionals.

Additional information about The Heart Truth campaign can be found at:  
[www.hearttruth.gov](http://www.hearttruth.gov).

## B. Objectives and Audiences

The purpose of this procurement is to obtain services to sustain and expand The Heart Truth campaign through strategic planning, creative development, implementation, and evaluation for the purpose of increasing awareness about women and heart disease and improving prevention and control of heart disease risk factors. The primary objective of the campaign is to increase awareness that heart disease is the #1 killer of American women. It seeks to promote the Red Dress as the national symbol for women and heart disease awareness and motivate women to take heart health seriously and engage in personal action to reduce their risk of heart disease. A secondary objective is to motivate health professionals to provide their women patients with clear messages about heart disease prevention and a high standard of care for the treatment and control of heart disease and its risk factors.

The overall objectives of The Heart Truth for the task order period are to:

- # Increase awareness, especially among women of color, that heart disease is the #1 killer of women,
- # Increase awareness that having risk factors can lead to heart disease, disability, and death,
- # Encourage women to talk to their doctors and to take action to control these risk factors,
- # Involve partners in ongoing efforts that advance risk factor detection and education, and
- # Promote awareness and adoption of the Red Dress as the national symbol for women and heart disease awareness.

Audiences:

*Primary*

- Women ages 40 to 60 (an age when risk increases), primarily those who
  - Are African American or Hispanic
  - Have at least one risk factor for heart disease
  - Are not taking action to reduce their risk

*Secondary*

- Women ages 18-39 (it's never too early to start taking care of your heart)
- Women ages 61 and over (it's never too late to take action to reduce your risk of heart disease)
- Physicians and other health professionals

## **II. Services to be Performed**

The contractor shall provide services to NHLBI's OPEC for sustaining and expanding The Heart Truth campaign and meeting NHLBI's public health education goals of increasing awareness of heart disease and seeking to end racial and ethnic disparities in the burden of the disease among women in the United States. Services shall include, but not be limited to, developing strategic plans; designing and producing communications and education products; conducting national, regional, and local partnership outreach and development; implementing and developing a plan for minority outreach; expanding media development and placement; coordinating national and local campaign events; and evaluating the campaign.

## **TASK 1: PROJECT MANAGEMENT AND ADMINISTRATION**

The contractor shall develop, implement with the approval of the Project Officer, and maintain a performance-oriented project management and administration process that can both forecast and report information regarding staff time and resources allocated and used for each phase of the project. This will include the development of a yearly strategic campaign plan (see Task 2.1). It will also include work plans to carry out specific activities of the task order, as requested by the Project Officer. These work plans may include the following:

- # Tasks to be accomplished
- # Methods and time lines for achieving the task
- # Allocation of resources, costs, hours, and personnel

The contractor shall hold regular meetings and/or conference calls with the NHLBI Project Team at the NHLBI. **[For solicitation purposes, the offeror should assume one to two monthly in-person meetings and three to four conference calls a month.]**

### **1.1 Project Manager**

The contractor shall provide a project manager for the period of performance of the task order who shall serve as the principal point of contact with the Government and who shall be responsible for the overall management of the task order including preparation of reports and plans, supervision of project staff, monitoring task order progress, and maintaining budget control.

### **1.2 Performance-Oriented Staffing**

The contractor shall provide a highly qualified staff with appropriate job knowledge and skills to perform the technical requirements of this performance-based task order. The project staff of the contractor (and subcontractors, if any) shall be available to meet with program staff at the NIH in Bethesda with as little as 2 hours advance notice. **[For solicitation purposes, offerors must demonstrate that this requirement will be met within 30 days of task order award.]** Whenever possible, meetings will be scheduled in advance.

### **1.3 Results Reporting**

The contractor shall ensure that all performance information collected in the operation of the task order, and recommendations to improve or simplify work practices, be formally submitted to

the NHLBI. Such information shall be summarized in a monthly performance-based technical report and submitted to the NHLBI Contracting Officer and Project Officer. The monthly reports shall include a separate appendix that identifies and evaluates achievement of the performance measures defined by the QASP. Associated costs, both direct and indirect, shall be reported monthly. This information shall be made readily available when requested by the NHLBI Project Officer.

The contractor shall be required to submit a final report 30 days prior to task order expiration that evaluates all work performed during the task order period and success in reaching the goals and objectives of Statement of Work (see Task 6 ).

#### 1.4 Use of Subcontractors and Vendors

Prior approval by the Contracting Officer shall be obtained before any subcontractors, vendors, consultants, or suppliers are used. Subcontractors and consultants shall be held accountable for achieving performance results in accordance with the QASP.

#### 1.5 Management and Administration of Cost Recovery

The contractor shall provide the necessary performance management and administrative functions to maintain and refine a cost recovery program for administering and carrying out The Heart Truth Single City Stop Program (Task 3.4). This cost recovery program will also apply to the NHLBI Heart Truth Road Show or other appropriate activities, if recommended by the Project Officer.

The contractor shall include as part of the monthly financial reporting requirements either a copy of all invoices, showing charge details, or a line item description of all charge details for all services billed under the cost-recovery mechanism.

#### 1.6 Fiscal Reporting Requirements

The contractor shall develop, implement, and maintain a forecasting and reporting system detailing staff time and resources allocated and used both by task. Associated costs, both direct and indirect, and funds remaining in the task order shall be reported to the Project Officer on a monthly basis. This information shall be made readily available at other times as well when requested by the Project Officer. As requested by the Project Officer, the contractor shall develop budgets for major campaign projects and activities. Additional financial reporting requirements for this task order are outlined in the Reporting Requirements section.

The project manager shall be required to submit a written request to the Contracting Officer for approval for all long-distance travel required under this task order, prior to travel. The project manager shall also be responsible for ensuring that all staff traveling to perform work required under this task order request Government travel rates and per diem when making travel arrangements and the policy of requesting an exemption available from the Contracting Officer, prior to travel, to exceed the Government rate when Government rates are not attainable.

#### 1.7 Transition PlanBTask Order Month 1

During the first month of the task order, operational responsibilities shall be assumed from the

incumbent contractor. **[For solicitation purposes, offerors should propose a specific plan and associated procedures for a seamless transition of operations from the incumbent contractor.]**

The contractor staff shall meet with the Project Officer within 2 days after award to discuss critical activities requiring immediate attention. A series of meetings with incumbent contractor staff and NHLBI staff shall commence within 1 week after award.

#### 1.8 Transition Plan Task Order Month 36

At the end of month 35 of the task order, a 1-month transition plan shall be implemented based on the following possibilities:

- # The incumbent contractor is unsuccessful in a subsequent recompetition requiring similar contractor services, necessitating a transition of services to a new contractor.
- # A subsequent procurement requiring similar contractor services may not be issued, necessitating a transition plan for the Government to gradually assume contractor services.

Upon award of the project to a new contractor or transfer of responsibility directly to the Government, the project manager shall request from the Project Officer a transition plan developed by the new contractor or Government official in charge of the transition. The project manager shall review the plan with the Project Officer to ensure a clear understanding of the tasks and responsibilities of all parties involved. The contractor's major responsibilities shall be to:

- # Participate in transition planning and schedule.
- # Ensure that ongoing project tasks continue through month 36 at which time the new service provider (contractor or Government) assumes those responsibilities.
- # Brief the new contractor staff or Government staff on the status and plans for each task activity.
- # Prepare (including packing, labeling, and inventorying) all project materials and records for transfer to the new service provider (contractor or Government).
- # Transfer any materials located in office or warehouse storage to the new service provider (contractor or Government).

### **TASK 2: STRATEGIC PLANNING**

#### 2.1 Developing a Strategic Campaign Plan

The contractor shall be responsible for developing a Strategic Campaign Plan for The Heart Truth each year of the task order. The first year's plan shall serve as a "master plan" for the campaign, looking forward over the 3-year span of the task order to set the overall campaign direction, objectives, audiences, opportunities, strategies, and tactics. It shall also provide detail on the specific opportunities, strategies, tactics, activities, and materials to be developed and implemented in the first year. The plans for years 2 and 3 shall update the year 1 "master plan," and provide detail on specific activities to be accomplished in each of those years. All plans shall include the proposed budget, staffing, and time line. The plans shall include specific recommendations for all key campaign components, including:

- # Maintenance, enhancement, and expansion of existing partnerships with nonprofit organizations, government agencies, media, and corporations,
- # Outreach to minorities, especially African American and Hispanic women, and the national and local organizations and media that serve them,
- # Community outreach and activities, including managing the Single City Stop Program, especially in communities with populations at high risk of heart disease (see Task 3.3),
- # American Heart Month, including National Wear Red Day and Fashion Week, and
- # Integrated media relations.

The Strategic Campaign Plan for year 1 shall be submitted 45 calendar days after task order award. Plans for years 2 and 3 shall be submitted 30 days prior to the end of each previous task order year.

### **TASK 3: PARTNERSHIP BUILDING AND OUTREACH**

#### **3.1 Developing New and Existing Partnerships**

The contractor shall be responsible for working with the NHLBI Project Team to maximize existing relationships with the partners currently involved with The Heart Truth campaign and form new relationships to help advance the objectives of the campaign. **[Note to Offerors: Existing partner relationships include corporations, the fashion industry, nonprofit and women's groups, media, government agencies, health care professional organizations, and community groups (for more information, see the Partners Page and Activity Registry on [www.hearttruth.gov](http://www.hearttruth.gov).)]**

In seeking to enhance and leverage existing relationships and develop new ones, the contractor shall focus on partners who can help attain the objectives defined in the Strategic Plan and facilitate partner involvement in and support for key campaign activities. Partnership activities shall emphasize expanding promotion of the Red Dress as the symbol of women and heart disease awareness through the broad array of methods and channels that may be made available through partner organizations. Partnership maintenance and development shall emphasize active involvement that helps to advance campaign priorities, including:

- # Fostering relationships with the campaign's founding partners,
- # Implementing highly visible American Heart Month 2006 activities, including a Red Dress Collection '06 fashion show during Fashion Week and National Wear Red Day (first Friday in February),
- # Developing opportunities for retail corporations whose products or corporate messaging are a good fit with the heart health messages and objectives of the campaign,
- # Developing opportunities for connecting corporate partners with campaign nonprofit partners as appropriate for cause-marketing programs that extend the messages of the campaign,
- # Forming partnerships with media companies having vehicles and channels that reach large numbers of women, especially African American and Hispanic women,
- # Involving community organizations, hospitals, and other regional and local groups in expanding the Single City Stop program and other local activities, especially in communities with populations at high risk of death and disability from heart disease,
- # Seeking partnerships with nonprofit and women's groups, especially with leadership organizations serving African American and Hispanic women. These groups should have strong membership networks, ties to their communities, and an interest in and capacity to focus on heart health, and



- # Involving key health professional organizations in activities designed to encourage their members to provide women patients with better heart disease risk assessment and treatment.

### 3.2 Managing Partner Relations and Projects

As part of partnership maintenance and development, the contractor shall manage ongoing partner relationships, as well as the activities and projects that develop from these relationships. Ongoing relationship management includes:

- # Maintaining and updating partner e-mail list **[For solicitation purposes, assume 100 contacts]**,
- # Developing and disseminating periodic email update messages to partners **[For solicitation purposes, assume 2 per quarter]**,
- # Planning and implementing one partnership meeting in each task order year **[For solicitation purposes assume a 1-day meeting at local hotel for 30 people, including air travel for 5 people]**,
- # Answering inquiries from existing partners and from organizations and corporations seeking to become partners, and
- # Updating Partner Pages on the campaign Web pages (see Task 5.3).

In addition, the contractor shall manage the activities and projects that may result from successful partnerships. These include major events such as the Red Dress Collection 2006 fashion show to be held as part of Fashion Week, as well as other efforts. The contractor shall provide support for:

- # Management of all aspects of Red Dress Collection '06 fashion show at Fashion Week in February 2006, and possibly in the second and third task order years, inclusive of outreach to potential corporate sponsors and designers, managing sponsor relations, input into creative execution of the event, development of collateral material, media relations, and reporting on results,
- # Input into and review of partners' promotional activities, including review of materials that may include campaign messages and logos,
- # Management of specific activities designed to reach chapters/members of targeted national organizations. Activities may include disseminating campaign materials as part of annual conferences, symposia, and other events; use of the campaign speaker's kit by members in their communities; linking to the campaign Web pages; publishing "drop in" newsletter articles; sending email notices to members about campaign events; and similar activities, and
- # Other activities resulting from partner relationships.

**[For solicitation purposes, assume for Fashion Week the content development and printing of media kits, save-the-date postcards and invitations, event program, gift bags, and booth signage.]**

### 3.3 Increasing Outreach Activities to Minority Populations

The contractor shall be responsible for developing and implementing a plan to expand Heart Truth outreach activities targeted to minority women, especially African American and Hispanic women. The outreach plan shall support NHLBI's commitment to achieving the Healthy People

2010 goal of ending racial and ethnic disparities in the burden of CVD. Minority outreach activities shall include, but not be limited to, the following:

- # Seeking partnerships with organizations serving minority women,
- # Forming partnerships with media companies having vehicles and channels that reach large numbers of minority women,
- # Coordinating outreach activities to promote heart disease awareness among women in collaboration with OPEC's existing national minority outreach and education activities including: Salud para su Corazón, American Indian and Alaska Native Outreach, Public Health in Public Housing, Asian American and Pacific Islander Outreach, and the NHLBI CVD Enhanced Dissemination and Utilization Centers, and
- # Promoting The Heart Truth Single City Stop Program to communities with large populations of minority women and high CVD burden.

### 3.4 Managing Single City Stop Program

The contractor shall be responsible for managing The Heart Truth's Single City Stop Program, which provides a mechanism for regional and local community groups, government agencies, hospitals, and other organizations to display a portion of the Red Dress Collection and campaign materials as part of community education activities and special events related to women and heart disease. The contractor shall:

- # Promote use of the Single City Stop mechanism in communities, especially those with populations at high risk of heart disease,
- # Respond to questions about the program and provide information on campaign branding and materials requirements, costs, and logistics,
- # Through the cost recovery mechanism, accept and account for funds from outside groups to cover the entire cost of a Single City Stop in their community (including staff labor hours and travel),
- # Track Single City Stop inquiries and responses,
- # Provide NHLBI with periodic updates on the status of the program and the number of confirmed requests,
- # Coordinate logistics for and implementation of confirmed Single City Stops, including shipping dresses, mannequins, and materials; working with vendors including stylists and shipping company; maintaining ongoing contact with host site to plan logistics and answer questions; ensuring that sites fill out evaluation information; and other logistical tasks,
- # Provide staffing onsite for each Single City event, and
- # Provide NHLBI with a report on each event after it takes place, including media results and photos.

**[For solicitation purposes, assume up to 25 Single City events a year with 13 events lasting 1 day and 12 events 3 days.]**

### 3.5 Managing The Heart Truth Exhibit Program

The contractor shall manage the planning, logistics, and staffing for displaying the existing campaign exhibit for health professionals at a total of four professional meetings/conferences per task order year. Materials to be displayed shall include The Heart Truth campaign materials as well as professional education materials on women and heart disease. The contractor shall be responsible for exhibit maintenance and repairs, if necessary, and for reporting on results of

each conference. Relevant professional conferences shall be proposed for the Project Officer's approval, and may include such groups as:

- # American College of Physicians
- # American College of Obstetricians and Gynecologists
- # American Academy of Nurse Practitioners
- # American Academy of Family Physicians
- # American Academy of Physician Assistants
- # American Public Health Association
- # American Heart Association
- # American College of Cardiology

#### **TASK 4: MEDIA RELATIONS**

The contractor shall provide ongoing media relations support for the campaign, including during major campaign observances such as American Heart Month and special events such as Fashion Week and National Wear Red Day, as well as media support to ensure that the campaign receives sustained coverage throughout each year of the task order. Priorities for this task are: Leveraging general campaign activities to achieve widespread national and local media coverage; targeting media that reach minority populations; and positioning NHLBI as a leader in heart health and on the issue of women and heart disease. Specific tasks include, but are not limited to:

- # Preparing specific media plans for major events/observances,
- # Contacting the media to promote campaign news and responding to inquiries from reporters regarding the campaign and its activities/events,
- # Managing preparation (including media training) and scheduling of campaign spokespersons **[For solicitation purposes, assume 2 media training sessions per year]**,
- # Preparing and disseminating press releases, press kits, and other printed press materials **[For solicitation purposes, assume 2 press kits per year]**,
- # Updating media kits and other media materials on the campaign Web pages,
- # Preparing and disseminating b-roll packages and audio news releases, and arranging for television satellite media tours/radio media tours **[For solicitation purposes, assume 2 b-roll packages and one SMT per year]**,
- # Managing media relations for special events such as Fashion Week, and
- # Tracking and reporting on media coverage.

**[For solicitation purposes assume production and printing of 1 media kit per year (in addition to the Fashion Week kit).]**

#### **TASK 5: CAMPAIGN MATERIALS DEVELOPMENT AND WEB SUPPORT**

##### **5.1 Campaign Materials**

The contractor shall be responsible for the design and production of a variety of communications, outreach, and education materials for The Heart Truth campaign. The materials may include, but not be limited to: mass media products and public service advertising; education materials for the target audience; PowerPoint presentations; graphics

and photography; Web site content and graphics; and Internet-based products. The contractor shall also assist the Project Officer in obtaining the required clearances for products. The actual mix of materials produced for the campaign will be an outgrowth of the marketing and communication planning process, and will include updating and revising current materials.

- # The contractor shall develop campaign materials geared to the target audience(s). The contractor also shall develop and implement a plan of quality control procedures to be used throughout the cycle of product development.
- # The contractor shall develop culturally sensitive materials; creative and attractive graphic design; print material design and layout; video production; photography; PowerPoint presentations; Web design and production; and other products.
- # The contractor shall develop message concepts for new materials that are appropriate for and appealing to the target audience(s). The message concepts shall address the unique needs of each audience segment (such as ethnicity/culture, language, reading ability, etc.).
- # As recommended by the Project Officer, the contractor shall test message concepts for materials in the developmental stages to ensure that they are clear, credible, effective, and easily understood and recalled by the intended audience. The contractor shall produce the messages in forms suitable for testing and shall submit a written summary of test results. The research methods used to test the materials will be selected by the NHLBI Project Officer in consultation with the contractor, and may include professional review, focus groups, mall intercepts, one-on-one testing, as well as other techniques.
- # As part of the yearly strategic campaign plan, the contractor shall develop objectives for marketing and dissemination of campaign materials developed under this task order.
- # The contractor shall be responsible for updating content and graphics for existing campaign materials, as requested by the Project Officer.
- # The contractor shall assist NHLBI staff in preparing PowerPoint slides for presentations at professional meetings and other events, as requested by the Project Officer.
- # The contractor shall employ a system of quality assurance and monitoring that results in the submission of error-free materials to the Project Officer.

**[For solicitation purposes, assume for the task order period five new print educational materials, six revisions/updates to existing materials, and three PowerPoint presentations per year. Assume costs for printing of educational materials.]**

## 5.2 Public Service Advertising and Other Media Products

The contractor shall be responsible for the design and production of public service advertising (PSA) products that promote The Heart Truth, such as TV, radio, and print PSAs and airport, Metro, and other transit advertising. The contractor shall assist the Project Officer in obtaining the required clearances for the products. The contractor shall also be responsible for video and b-roll production, as requested by the Project Officer.

- # The contractor shall develop packaging, make copies, and implement distribution plans for all PSAs.

- # The contractor shall track PSA usage and broadcast and print media coverage for The Heart Truth campaign and prepare regular reports on the results.

**[For solicitation purposes, assume 2 TV PSAs, 6 radio PSAs, 4 focus groups, 1 airport/Metro advertisement, and one 10-minute video.]**

### 5.3 Web Content Development and Support

The contractor shall support the updating and maintenance of The Heart Truth Web pages on the NHLBI Web site ([www.hearttruth.gov](http://www.hearttruth.gov)). The Web pages and all updates shall meet all the requirements of Section 508 (the Federal government's Electronic and Information Technology Accessibility Standards) and the NHLBI Web Style Guide. **[Note to Offerors: To access a copy of the Draft NHLBI Web Style Guide, send an e-mail to the Contracting Officer at [jm112c@nih.gov](mailto:jm112c@nih.gov) and request the URL or Web address.]**

Specific tasks shall include, but not be limited to:

- # Providing on-time updates to The Heart Truth Web pages with information about new campaign activities and partner activities. All updates shall be submitted to NHLBI for review 2 weeks before the target posting date. **[For solicitation purposes, assume 4 updates a year.]**
- # Reviewing the layout and content of The Heart Truth Web pages and making recommendations to improve the menu and navigation system to achieve the following objectives:
  - o Clearly showing on the home page, the type of information in the site,
  - o Providing a logical path to the information and other items in the site, and
  - o Readily accommodating additions to the site without having to overhaul the menu and navigation system.
- # Updating the layout and navigation of the Web pages following approval of recommendations and plans by the NHLBI.
- # Preparing or arranging for the preparation of files in the proper format for the Web that meets all the accessibility requirement of Section 508, displays appropriately in all major browsers on all platforms, and meets the needs of a variety of potential users. Specific requirements include:
  - o The size of all files shall be the smallest size appropriate for viewing and downloading by all potential users.
  - o Graphics shall be prepared in a variety of formats for display on the Web,
  - o The contractor shall not develop or include any "Flash" files without the prior approval of NHLBI.
  - o Selected high resolution graphics shall be prepared in formats for "downloading only" by the media, program planners, and others. The contractor shall prepare materials in proper file types, sizes, and formats for storing high resolution graphics on the Web. If graphics are stored in a compressed format (\*.zip, \*.sit, etc.), the contractor shall provide a hyperlink to a "free" decompression program.
  - o The contractor shall make the text portion of all graphics clear. If the text portion in an original graphic is not clear, the contractor shall edit the graphic to make the text clear.
- # The contractor shall write the Web version of all publications in HTML format. A PDF

version of the document may be prepared as a printer-friendly option for users.

- # The contractor shall prepare HTML documents in a manner that is completely Section 508 compliant including all tables and graphics.
- # The contractor shall prepare all PDF files with “bookmarks” to the various sections, if applicable, and fill out completely the “Description” component of the “Document Properties.” The “Author” in the description shall be “NHLBI.”
- # The contractor shall prepare slides in a variety of formats for viewing online (HTML) and downloading and making presentations (PDF and PowerPoint).
- # The contractor shall prepare all video files with captioning (opened or closed).
- # The contractor shall prepare a text script for all audio files.
- # The contractor shall create and disseminate electronic campaign banners. All banners developed by the contractor shall meet all the accessibility requirements of Section 508 even if they are not intended for placement on Federal Web sites. **[For solicitation purposes, assume 2 per year.]**
- # The contractor shall create digital files from a variety of sources and convert them to proper formats for use on the Web.
- # The contractor shall develop and maintain a development server that “mirrors” The Heart Truth Web pages on the NHLBI Web site.
- # The contractor shall post all changes and updates on the development server for NHLBI review and approval.
- # The contractor shall post all major updates to the site for NHLBI review and approval at least 2 weeks before the target launch date.
- # The contractor shall set up an “FTP” or “HTTP” site to transfer approved replacement files to NHLBI Web staff for placement in The Heart Truth Web pages.
- # The contractor shall assist in maintaining The Heart Truth Activity Registry.
- # The contractor shall collaborate with other NHLBI contractors who support the development and maintenance of the NHLBI Web site.

#### 5.4 E-marketing

The contractor shall develop and implement e-marketing methods to help promote The Heart Truth campaign.

- # The contractor shall create and implement an online marketing campaign to help promote The Heart Truth, which may include, but not be limited to:
  - o Implementing a PSA banner campaign by creating banner ads that promote the campaign and seeking public service placements on sites popular among

campaign target audiences. **[For solicitation purposes, assume 4 banners per year.]**

- Contacting targeted Web sites to pitch and place banner ads.
- Tracking banner ad placement, click throughs from banners to The Heart Truth Web pages, and impressions (number of times a user has viewed a banner ad).
- Developing a “Heart Truth e-zine,” an HTML e-mail, using campaign imagery and graphics as well as campaign messages to create an engaging and interactive e-mail. The contractor shall also develop a plan for promoting and distributing the “e-zine.” **[For solicitation purposes, assume 2 new issues per year.]**
- # The contractor shall work to increase the number of Web sites that link to [www.hearttruth.gov](http://www.hearttruth.gov) by writing a brief description about the campaign that contains the link to The Heart Truth Web pages, and identifying relevant Web sites, contacting them on behalf of NHLBI, requesting a link, and reporting the number of Web sites that place links.
- # The contractor shall develop and implement a plan to optimize Web search engines for The Heart Truth.

## **TASK 6: EVALUATION ACTIVITIES**

The contractor shall design and carry out a series of evaluation activities each year of the task order that will both capture the results of The Heart Truth campaign efforts and regional/local community outreach activities and provide direction for new activities. The contractor shall also evaluate its achievement of the key performance requirements defined in the QASP as part of each monthly report and final evaluation report.

### **6.1 Evaluating The Heart Truth Campaign**

The contractor shall develop and conduct a coherent and practical system of evaluating the implementation process and outcomes of The Heart Truth campaign. The system of evaluation shall use a variety of indicators that are appropriate to the communications strategies being evaluated. Evaluation components shall include, but not be limited to, the following:

- # Media and PSA placement results
- # Scope and success of regional/local campaign partner activities
- # Partnership building results
- # Minority outreach results
- # Community outreach results
- # Achievement of yearly campaign strategic plan
- # Final campaign evaluation report **[Note to offerors: This report is the Final Report.]**

### **6.2 Evaluating Achievement of Key Performance Requirements (QASP)**

In consultation with the Project Officer, the contractor shall evaluate its achievement of the key performance indicators defined in the QASP. This evaluation shall be included as an appendix in each monthly technical report. The contractor shall also evaluate its overall achievement of the key performance indicators over the term of the task order as part of the final evaluation report.

## **REPORTING REQUIREMENTS**

### **A. Technical Progress Reports**

1. **Monthly Technical Report:** Monthly reports shall be due 10 calendar days after the end of each month, and submitted electronically to the Project Officer and Contracting Officer. Reports shall be in narrative form, and include all activity conducted during the previous month. Monthly reports shall include, but not be limited to, the following components:

- # A qualitative description of major activities and performance results on each project task.
- # A discussion under Task 1, Project Management and Administration, of any budgetary issues, such as overruns, and plans to adjust future expenditures so that contract expenditures remain within the approved budget. A list of all contractor staff—not bid to perform work on the contract—whose labor hours are charged to the contract in any given month, shall be identified for each project task. In addition, a brief description of the work they performed for the task order shall be included. A list of all subcontractors/consultants who performed work during the month under the task order shall be included along with a description of the work performed.
- # Identification of any performance gaps and discussion of corrective action plans.
- # A discussion of the work to be performed during the next monthly reporting period.
- # An appendix that identifies the contractor's performance-based measures under the QASP with evaluation of achievement of each measure during the reporting period.

2. **Monthly Financial Report:** The contractor shall prepare a monthly financial report that organizes and details labor hours and all expenditures. The report shall be due 25 calendar days after the end of each month and submitted electronically to the Project Officer and Contracting Officer. The format of the report shall be in Excel spreadsheets or other format approved by the Project Officer and Contracting Officer. Financial Reports shall include, but not be limited to, the following components:

- # A summary spreadsheet, showing current period and cumulative expenditures by task for each major expenditure category, such as labor hours, labor dollars, consultants, subcontractors, other direct costs, long-distance travel, loading factors, and cost recovery billed. An annual report shall include an additional column: variance between amounts budgeted and spent.
- # A spreadsheet showing staff name, title, hourly rate, hours budgeted for task order year, hours this period, hours remaining this year, cumulative hours used, total contract remaining hours and the same type of information for loading factors and other direct costs. An annual report shall include an additional column: variance between amounts budgeted and spent.
- # An organized accounting and reporting of all staff long-distance travel, which shall include staff name, purpose of travel, dates of travel, listing of all travel expenses.



3. Strategic Campaign Plans: A copy of a Strategic Campaign Plan (as described under Task 2) for Year 1 shall be submitted electronically to the Project Officer for approval 45 calendar days after task order award. This plan shall detail the objectives to be met and program strategies to be implemented, and the evaluation strategies to be used during the period of performance. The plan shall also provide a time line for accomplishment of tasks, staffing, and the proposed budget for implementing the plan.

The Strategic Campaign plan for Years 2 and 3 shall be submitted electronically 30 days prior to the end of each task order year to the Project Officer for approval. The plans shall contain the same elements as for Year 1.

4. Annual Exhibit Plan: The contractor shall submit to the Project Officer the Annual Exhibit Plan for the upcoming year by October 1 of years 2 and 3. The first year's plan shall be submitted within 3 weeks of the task order award.
5. Final Report/Evaluation Report: The Final Report shall be submitted to the Project Officer and Contracting Officer 30 days before the conclusion of the task order. Two copies of all nonelectronic materials that accompany the report shall be submitted to the Project Officer.
6. Technical Reports as Requested by the NHLBI Project Officer: The contractor shall prepare additional technical reports based on the statement of work as requested by the NHLBI Project Officer. Examples include, but not limited to: The Heart Truth Single City Stop and Road Show Programs, PSA and media placement reports, corporate partnership outreach results, minority outreach results, and Fashion Week/American Heart Month. Two copies of all nonelectronic materials that accompany these reports shall be submitted to the Project Officer.
7. Data Files, Disks, Media Master Copies, and Electronic Files of all Web Pages: The contractor shall deliver to the NHLBI Project Officer, on or before the last day of the task order period of performance, all master copies of all materials produced during the task order period. This includes all originals (print materials and graphics), disks, videos, CD-ROMs, DVDs, negatives, photographs, slides, computer files and any other media or print master copies. The materials shall be clearly marked and an inventory of all materials shall be included.

## **DELIVERABLES**

Satisfactory performance of the final task order shall be deemed to occur upon delivery and acceptance by the Contracting Officer, or the duly authorized representative, of the following items, or their equivalent, during each year of the task order, in accordance with the stated delivery schedule:

Item	Description	Number	Delivery Schedule
1	Monthly Technical Report	2	10 calendar days after the end of each month. Submitted electronically.
2	Monthly Financial Report	2	25 calendar days after the end of each month. Submitted electronically.
3	Strategic Campaign Plans	1	Year 1—45 calendar days after task order award. Years 2 and 3—30 days prior to the end of each task order year. Submitted electronically.
4	Annual Exhibit Plan	1	Year 1—3 weeks after task order award. Years 2 & 3 by October 1. Submitted electronically.
5	Final Report/Evaluation Report	2	30 days prior to the completion of task order period (end of month 35). Narrative portion submitted electronically.
6	Technical Reports as Requested by the NHLBI Project Officer	1	As requested by the NHLBI Project Officer. Narrative portion submitted electronically.
7	Data files, disks, media master copies, and electronic files of all Web pages	All	End of task order period.

All the above items (1-7) shall be delivered electronically, unless otherwise specified, to the NHLBI Project Officer. Monthly technical reports, monthly financial reports, and final report/evaluation reports only shall be delivered to the Contracting Officer. Two copies of all nonelectronic materials that accompany any deliverable shall be delivered to the Project Officer. Addresses are as follows:

Project Officer  
NHLBI/OPEC  
31 Center Drive MSC 2480  
Building 31 Room 4A10  
Bethesda, MD 20892-2480

Contracting Officer  
NHLBI/DEA/Contracts Operations Branch  
BDR Contracts Section  
6701 Rockledge Drive MSC 7902 (Room 6138)  
Bethesda, MD 20892-7902

## **Reference Material**

The Heart Truth Web pages; [www.hearttruth.gov](http://www.hearttruth.gov)

## **Proposal Requirements**

### *Critical Elements of the Technical Approach*

The offeror should describe its role and its proposed processes in providing the services described in Tasks 1-6. In addition, the offeror should describe the standard operating procedures that will be used to facilitate interaction between NHLBI and the contractor, while insuring the considerable involvement of the Project Officer in all aspects of the task order. Included should be descriptions of types of personnel, levels of effort, plans to maintain quality control, and approaches to be used to minimize costs. It is essential for the offeror to describe specifically the steps to be taken to ensure that all work produced under any resultant task order is scientifically accurate, written in clear English, and prepared in final form so that it is without typographical or other errors. The use of subcontractor or other outside consultants should be identified and justified, with particular emphasis on demonstrating the ability of the subcontractor to integrate its efforts with those of the offeror and to ensure that the needs of the NHLBI are met, when such capability does not exist in-house. A subcontractor may augment, but may not supply the full expertise for, any of the Tasks 2-6 the task order.

The offeror should identify the authors of the technical proposal.

### *Staffing Plan*

The offeror should include a staffing plan, including an organizational and reporting structure/chart under Subtask 1.2, Performance-based Staffing, along with a brief narrative description of proposed key staff members' experience, capabilities, and expertise. Key staff may include, but not be limited to:

- # Corporate monitor
- # Project manager
- # Partnership outreach coordinator
- # Media specialist
- # Minority outreach specialist
- # Community outreach coordinator
- # Writer (with experience in writing health information publications for patients and the public)
- # Creative Director (for campaign materials, including public service advertising)
- # Web developers

Resumes for all proposed staff must be included in an appendix and organized alphabetically.

### *Related Experience of the Organization and Facilities.*

Offerors shall present in an organized manner and clearly describe their experience with other projects (currently active or completed within the past 3 years) similar to that described in the RFTOP in an appendix. Sample letters of reference and Contractor Performance Reports should be included. The offeror shall also provide an overview of their facilities and equipment.

## Other Proposal Requirements

### *Business Proposal*

The business proposal shall be submitted under separate cover. This should include a detailed proposal for labor hours, labor costs, fringe benefits, G & A, overhead, fee, and other direct costs and indirect costs.

### *Samples of Previous Work*

The offeror is required to submit with the proposal, samples of work done by personnel proposed for the contract. Where possible, the samples should be similar to products described in Tasks 1-6. Proposed personnel must be specifically identified for their function and/or contribution to each work sample. The selection of appropriate samples shall be sufficient to demonstrate the abilities of the proposed personnel and to show their experience.

Note: One copy of each of the sample materials, limited to 10, should be submitted.

## **Special Requirements**

1. Offerors should limit the size of their technical proposals to 60 pages (excluding appendices) of text. Proposals (an original and five copies) are to be formatted in an Arial 11- or 12-point font or Times Roman 12-point font; single spacing may be used for the text, but headings and paragraph breaks must be double-spaced. There should be 1-inch margins all around. Pages must be numbered. A table of contents should identify proposal sections. The proposal must include all sections.
2. Offerors shall propose a Quality Assurance Surveillance Plan that has measurable performance standards to enable assessment of contractor work performance. Performance standards shall reflect the contractor's achievement of the overall goals of The Heart Truth and critical components of the tasks in the Statement of Work. The proposed performance standards shall be measurable and evaluated with a 5-point scoring system (0=Unsatisfactory, 1=Poor, 2=Satisfactory, 3=Excellent, 4=Outstanding). The final QASP will be negotiated and incentives will be identified. Some examples of potential areas for building measurable performance indicators include, but are not limited to, the following:

### Task 1: Project Management and Administration

- Submission of task order deliverables, such as the Monthly Technical Report and Monthly Financial Report on required due dates.
- Performance of approved yearly strategic campaign plan within proposed budget.
- Responsiveness to Project Officer.

### Task 3: Partnership Building and Outreach

- Number of new partnerships with organizations that serve minority women—contacts made; number of partner relationships formed and sustained.
- Management of activities and events that result from successful partnerships such as Fashion Week, National Wear Red Day, etc.
- Number of new contracts for Single City Stops in communities with large minority populations and high burden of CVD.

#### Task 4: Media Relations

- Number of media contacts per month.
- Number of media impressions.
- Number of media placements in venues targeted to minority women.

#### Task 5: Campaign Materials Development and Web Support

- Submission of high-quality materials—well written; appropriate for target audience; scientifically accurate.
- Provision of on-time, properly prepared files for updates to The Heart Truth Web pages, which meet all of the requirements of Section 508.

3. To assure rapid response to changing program needs, and to assure adequate day-to-day management of complex activities that must be conducted in close concert with activities of NHLBI staff, other Federal agencies, and other contractors, the project staff of the successful offeror must be available to meet with program staff at the NIH in Bethesda with as little as 2 hours advance notice. The offeror must submit a plan to meet this requirement. Thus, offerors are required to submit evidence of the ability to obtain the necessary facilities, equipment, and personnel. The description shall identify those personnel who would be available. Also, the arrangement, whether firm or contingent upon award, for the rental, purchase, or other acquisition of resources necessary for the day-to-day operation shall be described and supportive evidence furnished for resources not yet functional.
4. To assure rapid response to changing program needs, and to assure adequate day-to-day management of complex activities that must be conducted in close concert with activities of NHLBI staff, other Federal agencies, and other contractors, it is imperative that the offeror demonstrate, for any proposed subcontracting relationships, its ability to ensure responsiveness to the needs of the Institute and to maintain management accountability. The extent to which any proposed subcontracting relationship is integrated into the offeror's proposal will be considered relevant evidence on this issue.
5. The NHLBI serves as the lead agency for the national research effort directed toward cardiovascular, pulmonary, and hematological diseases, sleep disorders, and blood resources, and its communications are distributed widely with target audiences including the Congress of the United States, the Department of Health and Human Services, other Executive Branch Departments, the medical care and scientific research communities, and the public. Therefore, it is imperative that all materials and services delivered to the Institute be provided in a timely and accurate manner and that all materials leaving the Institute are error free and received by the proper audiences.

## TECHNICAL EVALUATION CRITERIA

Proposals submitted in response to this solicitation will be subjected to an in-house review by an ad hoc committee of the NHLBI and other NIH staff who are familiar with the requirements of the RFTOP. Each offeror's proposal will be evaluated according to the factors listed below and are listed in order of relative importance with weights assigned for evaluation purposes.

Number	Criteria	Points
1	<p><b>Understanding of the Requirements and Adequacy of the Proposed Approach of Tasks 1-6</b></p> <p>Understanding of the kind and level of support required; the quality, creativity, and innovativeness of the technical approach; and the quality, efficiency, and effectiveness of the work products described and demonstrated by the proposal.</p> <p>The offeror must clearly describe the proposed processes for performing the work under each task (as opposed to repeating the requirements). The evaluation will focus on the offeror's demonstrated innovation and creativity and ability to achieve Tasks 1-6.</p> <p>Demonstrated understanding, expertise, and experience in the public health goals of NHLBI; communications planning, implementation, and evaluation; media and outreach activities; minority outreach activities; partnership building and nurturing; public relations activities; health communication and health behavior theories; health promotion strategies and activities; and materials development and dissemination.</p> <p>Detailed plan for an effective system of quality control, citing examples of experience with the types of errors that may be encountered in work of the kind to be performed under this task order and the mechanisms that it has in place to guard against future occurrence of such errors.</p> <p>Appropriateness of the QASP, which includes measurable performance standards to enable assessment of contractor work performance.</p>	35 points
2	<p><b>Qualifications of Personnel</b></p> <p>Experience, qualifications, and availability of proposed personnel and subcontractor staff, if any. Qualifications and experience will be evaluated as follows:</p>	30 points

Number	Criteria	Points
	<p>The project manager should be a senior staff member of the organization and demonstrate ability in effective program management and cost and quality control, as well as success in leading similar national-level health communications/awareness campaigns.</p> <p>Supporting materials should include a curriculum vitae and statements of reference concerning management activities similar to those solicited. If the proposal includes subcontracting relationships, evidence must be provided of the ability of the project manager to ensure timely completion of quality work from a subcontractor.</p> <p>Qualifications, availability, and experience of proposed professional staff (including those committed to the task order in writing but not yet working with the organization).</p> <p>Demonstrated expertise and experience of project team composed of qualified staff in all aspects of implementing a national health communications campaign—particularly, high-level skills in strategic planning; media outreach and relations; public relations; partnership outreach and development; minority outreach; community outreach and program activity coordination; Web site structure and content development; mass media and public service advertising development; exhibit management; and writing, editing, and proofreading health education materials for patients and the public.</p> <p>Availability of experienced staff for possible extensive long-distance travel to staff campaign exhibits at events and support community Heart Truth events.</p>	
	<p><b>Qualifications of Personnel, continued</b></p> <p>Work samples should be similar to products described in Task Areas 2-6 of the RFTOP. Samples will be evaluated in terms of ability to develop materials that are creative, appropriate, clear, and succinct. Correct use of grammar, quality of editing, and absence of jargon are imperative. The proposal itself will be considered a work sample, and contributors to the proposal should be identified by name and corresponding section of the proposal.</p>	

Number	Criteria	Points
3	<p><b>Organization and Administration</b></p> <p>Clarity and effectiveness of organizational structure and relationships, including relationships with subcontractor(s), if any, expected ease and efficiency of management and control, and organization's commitment to this task order. Effectiveness of the proposed management processes (Task 1) and staff organizational chart. Effectiveness of management structure proposed for any subcontracting relationships. Clearly identified contributions of subcontractor(s) and methods to ensure effective integration of activities.</p>	20 points
4	<p><b>Related Experience of the Company</b></p> <p>Experience of the organization as described and past performance as documented in Contractor Performance Reports. Experience in projects similar to that described in the RFTOP. Suitability of facilities and resources.</p>	15 points
	Total Weight	100 points